



Arizona CHOICES

Access to Recovery

Voucher Management System (VMS)

**Training Manual
For
County Fiscal Coordinators**

2009



The Voucher Management System

Overview

Welcome to the Voucher Management System (VMS)!

The Voucher Management System is a web-based tool that is used to manage the Access to Recovery Drug Court Client treatment and recovery support services vouchers.

The Manual is divided into five sections that will go over the steps you need to know to successfully enter new Provider contracts; reimburse Providers for services rendered first by releasing payment for the voucher claims, and then downloading the information you need to complete the Accounts Payable report; and, utilize the report function of the VMS.

If you ever have questions on how to maneuver through the VMS system, please feel free to email Pima Prevention Partnership at:

azatrhelp@thepartnership.us

Or call us at:

1-866-476-5777

Help is available Monday through Friday, 8:00 am to 5:00 pm. We will make every attempt to respond within one business day.

Section One: Getting Started in VMS

In this section you will:

- Find out where to go on the internet to access the VMS system and learn about your password.
- Become familiar with the components on the VMS home page

Section Two: Creating a Contract

In this section you will learn how to:

- The procedures and process for entering a new Agency Contract into VMS

Section Three: ATR Plan Management

In this section you will learn how to:

- Monitor the allocated funds and control the burn rate
- Set the lifetime client funding cap

Section Four: Claim Batch Processing

In this section you will learn:

- View the results of the pre-adjudication process
- Adjudicate a claim batch and finalize it for payment

Section Five: Accounts Payable Report

Section Five is currently under review by the County Fiscal Coordinator

Section Six: VMS Reports

In this section you will learn:

- What reports VMS offers, and their purpose.
- How to print or download reports



Section One:

Getting Started in VMS

✓ Before You Start

Before You Start...

- ✓ Use Internet Explorer as your web browser. The VMS does not work well with Mozilla Firefox, Netscape, or Safari.
- ✓ Please note that the website address does not include “www” at the beginning.
- ✓ “Maximize” your screen by clicking on the icon in the top right corner.
- ✓ Always remember to log out of the VMS system. For security reasons, the system is designed to lock out users with open, inactive connections.
- ✓ Many of the screens allow you to download the information into an Excel spreadsheet. To download, look for the **(Export)** link and hold the **CTRL** button down until the prompt to open the file appears.

The VMS website address is:

<https://az.witsweb.org>

Each time you log into the VMS, you will enter a User ID, Password, and PIN.

- You will receive an email with your User ID, Password, and PIN number to use the first time you log into the system.
- Once you log in, you can choose your own Password and PIN. These must be at least six (6) characters long and contain at least one number and one letter.
- You have three tries to successfully log in under your user name. After this, the system will disable your account and you will need to contact PPP to re-enable your account.



Section One:

Getting Started in VMS

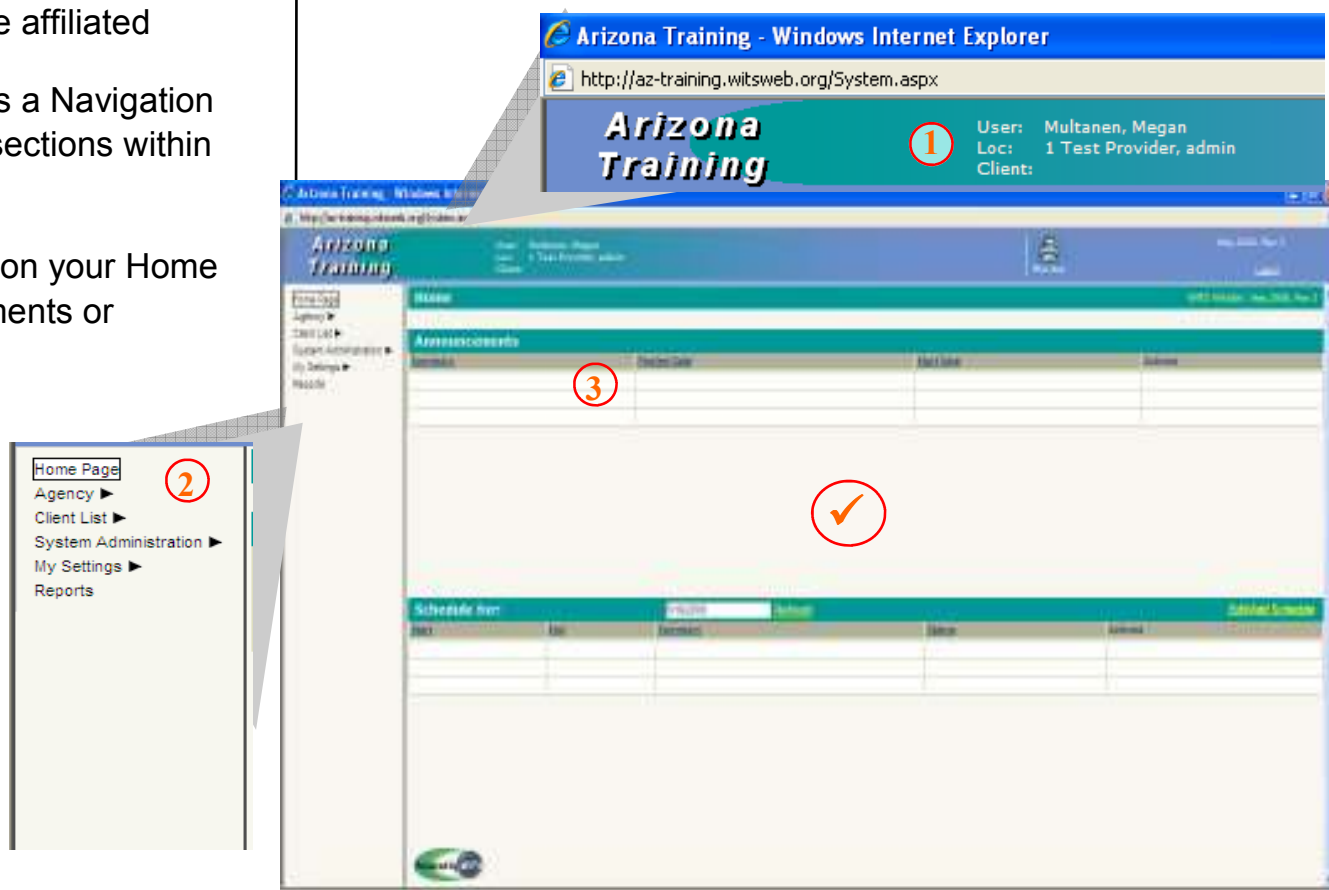
✓ The Home Page

The first screen that opens is the *Home Page*.

The *Home Page* has three main areas:

1. The Top Navigation Bar will show your name and the agency to which you are affiliated
2. The Left Navigation Pane shows a Navigation Menu with links to the various sections within the VMS.
3. The Main Screen/Content Area on your Home Page will show any announcements or schedule information.

✓ As you navigate through the VMS, this area will show agency, client, referral, or other information based on your search.



Section Two:

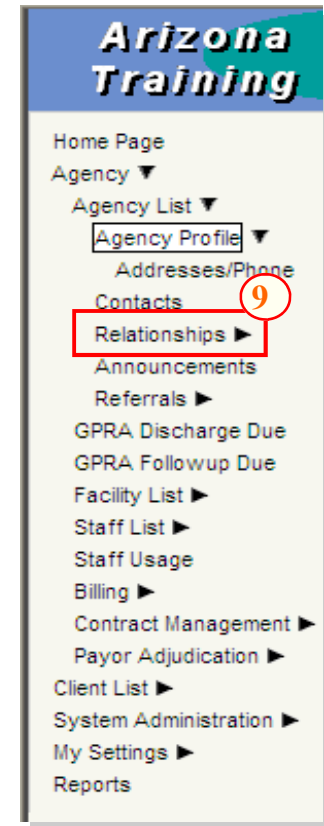
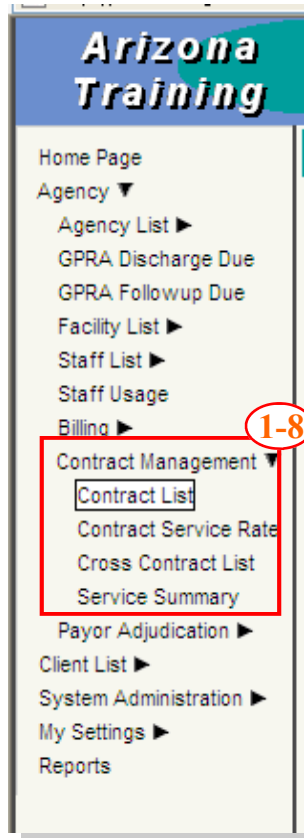
Provider Contracts ✓ Contract Components

Now that an Agency Record has been created and any necessary codes entered, an Agency Contract can now be generated in the VMS.

The process for entering a contract has several detailed components. However, the Left-side Navigation Menu contains a link to each of the sections required to set up a contract. Most of these links are located in the submenu under Contract Management.

The components that the VMS requires include:

1. A Contract Profile
2. An Associated Plan
3. Associated Groups
4. Agency Facility/Contract Association
5. Authorization Period
6. Contract Tier
7. Enter Services
8. Contract Rates
9. Disclosure Relationships



Note: Associated plans, contracted facilities and an authorization period must be entered and the status must be active before the contract can be used for the vouchers and billing.




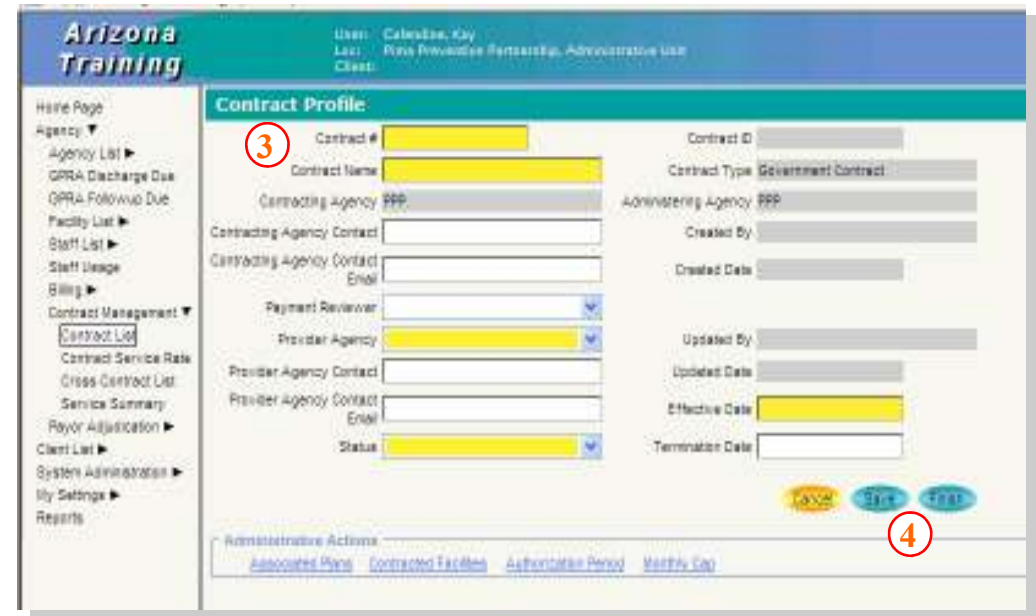
Section Two:

Provider Contracts

✓ Creating Contract Profiles

To create a contract:

1. Click on the Agency and then the Contract Management links on the Left Navigation Menu. This will bring up the *Contract Search* screen.
2. Click on the [Add Contract](#) link located on the Contract List screen.
3. When the Contract Profile screen appears, complete the required fields
 - a. Contract Number: This number is generated by the Administration Agency
 - b. Contract Provider Agency Name: Choose the appropriate Provider Agency from the drop-down menu. If the Provider Agency name does not appear in the list, you will need to create an Agency Profile (see page 7).
 - c. Provider Agency Contact and Contact Email: Any system-generated emails will be sent to this email address and will display the name entered in the Agency Contact.
 - d. Status: This will need to be set to "Active" to be able to create vouchers for the contracted provider.
4. Click on the  button to save the Contract Profile







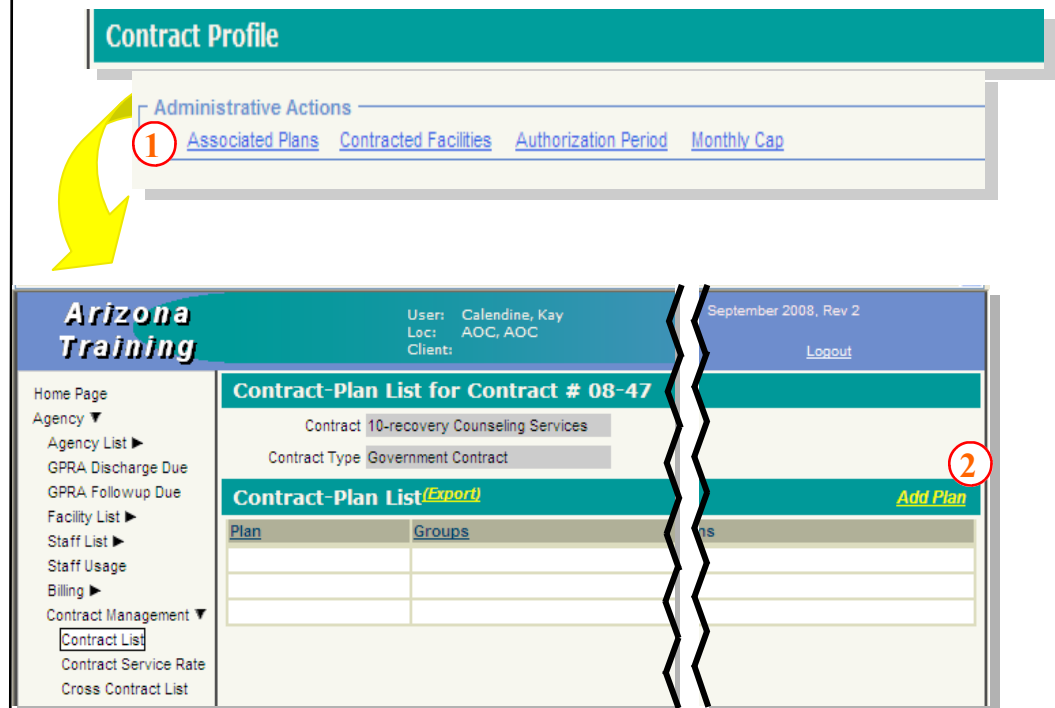

Section Two:

Provider Contracts

✓ Add an Associated Plan

To connect an Associated Plan to the contract:

1. While you are still on the Contract Profile screen, the Administrative Actions box includes a link to [Associated Plans](#). Click on this link to create a plan association.
2. On the Contract-Plan List for Contract # screen, click on the [Add Plan](#) link.
3. A drop-down list will appear at the bottom of the screen.
- ✓ There is only one plan associated with all of the contract plans. This will already be entered into the system, so you will not need to create a plan.
4. After selecting the plan, click on the  button.
5. From this screen, click on the [Add Group](#) to add an associated group.
6. Click on the  or  finish button to complete this step.



The screenshot displays two overlapping windows from the Arizona Training VMS system. The top window, titled 'Contract Profile', has a teal header and contains a box labeled 'Administrative Actions' with a yellow arrow pointing to a red circle containing the number '1' next to the 'Associated Plans' link. Other links in this box include 'Contracted Facilities', 'Authorization Period', and 'Monthly Cap'. The bottom window, titled 'Contract-Plan List for Contract # 08-47', has a teal header and a left sidebar with a menu including 'Home Page', 'Agency List', 'GPRA Discharge Due', 'GPRA Followup Due', 'Facility List', 'Staff List', 'Staff Usage', 'Billing', and 'Contract Management'. The main area shows contract details: 'Contract 10-recovery Counseling Services' and 'Contract Type Government Contract'. Below this is a table with columns 'Plan' and 'Groups'. A red circle containing the number '2' is next to the 'Add Plan' link in the top right corner of this window. The bottom of the window features buttons for 'Contract List', 'Contract Service Rate', and 'Cross Contract List'.





Section Two:

Provider Contracts

✓ Connecting Agency Groups & Facilities

After the Contract Associated Plans has been completed, the next step is to connect Agency Facilities to the contract.

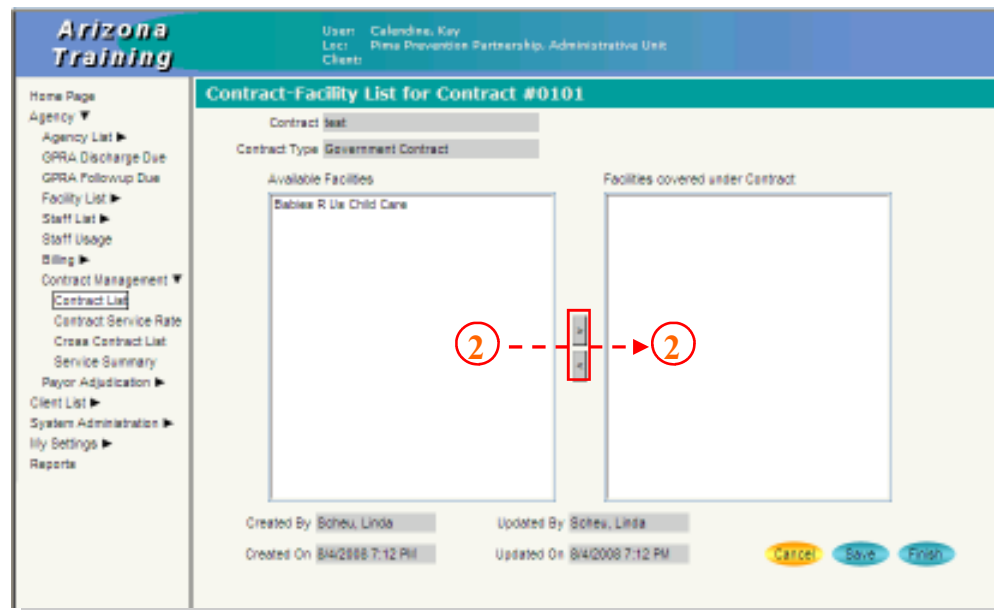
1. While you are on the Contract Profile screen, the Administrative Actions box includes a link to [Contracted Facilities](#). Click on this link to create a facility-contract association.
2. When the Contract-Facility List for Contract #XXX opens, select a facility in the Available Facilities box and click  to move it to the Facilities covered under Contract.
3. Click on the  button to complete this section.

Contract Profile

Administrative Actions

1

[Associated Plans](#) [Contracted Facilities](#) [Authorization Period](#) [Monthly Cap](#)

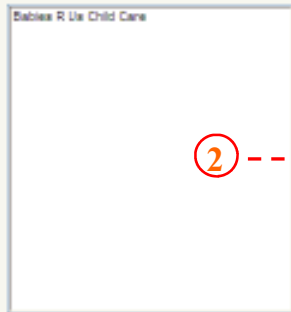


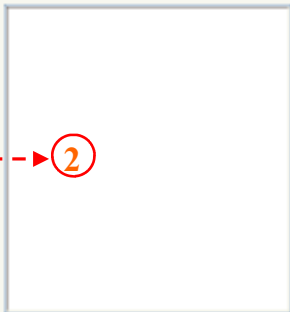
Arizona Training

User: Calandrea, Kay
Last: Pima Prevention Partnership, Administrative Unit
Client:

Contract-Facility List for Contract #0101

Contract Seat: _____
Contract Type: Government Contract




Available Facilities: 

Facilities covered under Contract: 

2 - - - - - 2

Created By: Schen, Linda
Created On: 8/4/2008 7:12 PM

Updated By: Schen, Linda
Updated On: 8/4/2008 7:12 PM



Section Two:

Provider Contracts ✓ Entering Authorization Period

After a facility has been associated with the contract, the Authorization Period and Contract Tiers are defined:

To define the Contract Authorization Period:

1. Click on the [Authorization Period](#) link located in the Administrative Action box on the Contract Profile page.
2. When the Contract Authorization Period page opens, click on the [Add New Period](#) link.
 - ✓ The bottom section of the screen, called Contract Authorization Period Profile, is now active.
3. Complete the required fields:
 - ✓ Fiscal Year
 - ✓ Effective Date (first date of services)
 - ✓ Termination Date (final date of services)
 - ✓ Claim filing cut-off date (this is the last date encounters can be released to billing and still be paid.)
4. Click on the [Finish](#) button.

The screenshot shows the 'Contract Profile' page at the top, with a yellow arrow pointing to the 'Authorization Period' link in the 'Administrative Actions' box. Below this, the 'Contract Authorization Period for Contract #01111' page is shown. It features a table for 'Authorization Periods' with columns for 'Period', 'Start Date', 'End Date', 'Termination Date', and 'Claim Filing Cut-off Date'. A 'Add New Period' button is visible. Below the table is the 'Contract Authorization Period Profile' section, which contains fields for 'Fiscal Year', 'Effective Date', 'Termination Date', 'Claim Filing Cut-off Date', and 'Authorization #'. A 'Finish' button is located at the bottom right of the profile section. Numbered callouts 1 through 4 highlight key elements: 1 points to the 'Authorization Period' link, 2 points to the 'Add New Period' button, 3 points to the input fields in the profile section, and 4 points to the 'Finish' button.

The new Authorization Period record will now show in the Authorization Period list.



Section Two:

Provider Contracts

✓ Setting Contract Tiers

The new Authorization Period record showing in the Authorization Period list will include a link in the Actions column called [Tiers](#).

To add the Contract Tier:

1. Click on the [Tiers](#) link located under the Actions column associated with the Authorization period that was added.
2. When the Contract Tier screen appears, click on the [Add New Tier](#) link.
 - ✓ Only one tier is required per authorization period and plan group combination. Since only a single plan, group and authorization period are entered for ATR, only one tier can be added.
3. Enter the required information under the Tier Profile heading and click on the **Finish** button.

Contract Tier Management for Contract #2 TP12345

Contract TP2 Contract Effective Date 7/1/2009
 Provider 2 Test Provider End Date 9/30/2010

Tier for Authorization Period 08-10 (Export) [Add New Tier](#)

Tier #	Plan-Group	ASAM	Actions
12	ATR-ATR		Profile Adjust Delete



Section Two:

Provider Contracts

✓ Setting Service Rates

Next, Contract Service Rate are added to the contract in the VMS System.

To add the Contract Service Rate:

1. Click on Contract Service Rate located on the Left-side Navigation Menu.
2. When the Contract Service Rate screen appears, click on the [Add New Contract Rate](#) link.
3. This will bring up a new screen called "Contract Service Rate Profile."
 - a. There will be several drop down menus with the available options

Service: Select from a list of existing services

Rate Type: By selecting "Contract," the rate will apply to this contract only, whereas selecting "Standard" will apply the rate to all active contracts.

Group: Only ATR will be available to select.

Contract: Select the appropriate contract from the contracts that have been completed.

Provider Facility: This is optional and assigns services to the specified facility.

Rate per Unit: Enter the cost associated with one unit of service.

The screenshot displays two screens from the Arizona Training VMS system. The top screen, 'Contract Service Rate Search', features a left navigation menu with 'Contract Service Rate' highlighted (callout 1). The main area has search filters for Service, Provider Facility, Group, Contract, and Contractor. A yellow arrow points from the 'Add New Contract Rate' link (callout 2) to the bottom screen, 'Contract Service Rate Profile'. This screen contains several dropdown menus: Service (callout 3), Rate Type (callout 4), Group, Contract, and Provider Facility. It also has input fields for Rate Per Unit, Description, Effective Date, Expiration Date, Created Date, and Updated Date. At the bottom right, there are 'Cancel', 'Save', and 'Finish' buttons, with 'Finish' highlighted by callout 5.

Effective Date: This is the date services will be available.

Description: Enter the definition of a unit, such as hours, days, or rides.

4. Repeat these steps as necessary depending on the number of contracts and services required for each agency.
5. Complete this section by clicking on the **Finish** button.

The Contract Plan and Service Rates are now complete.



Section Two:


Provider Contracts


✓ Disclosure Relationships

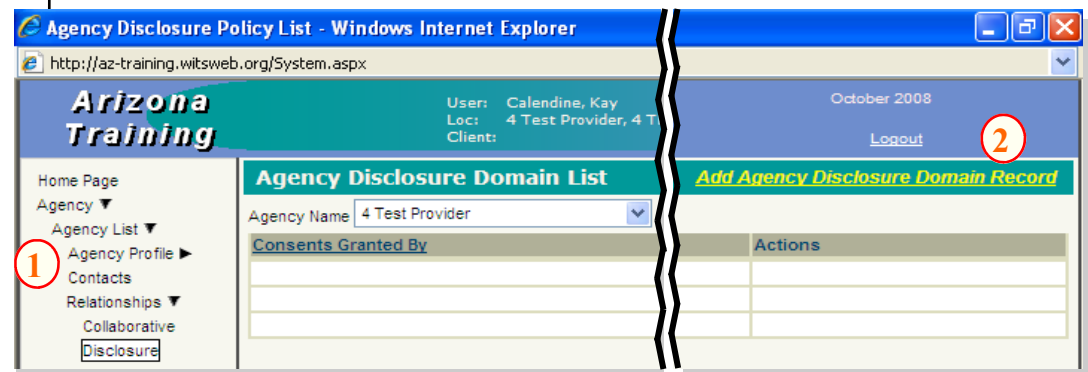
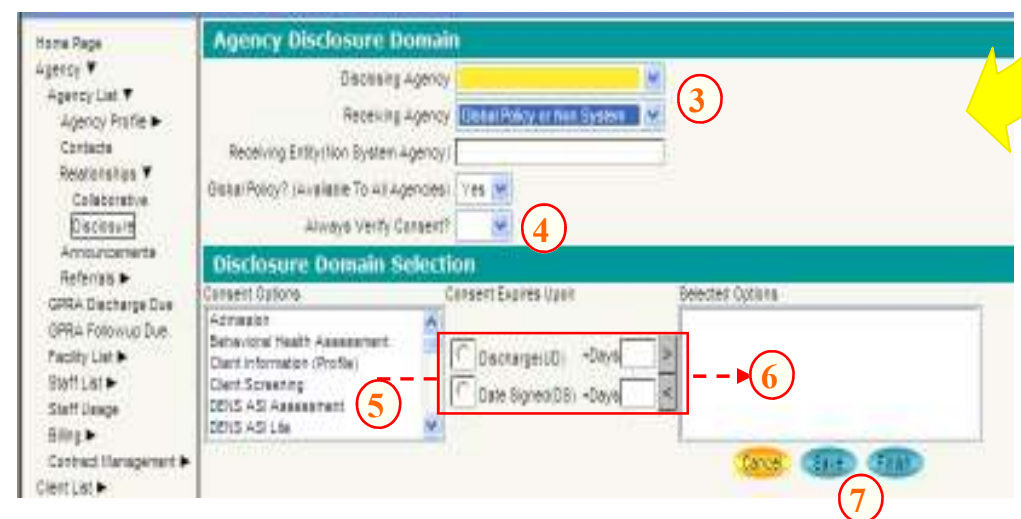
If you are entering an agency contract that will be receiving or providing client information to another agency, you will need to establish a Disclosure Relationship between the two agencies.

To create a Disclosure Relationship:

1. In the Agency submenu on the Left-side Navigation menu, click on Relationship and then on Disclosure.
2. Click on the Add Agency Disclosure Domain Record.
3. When the Agency Disclosure Domain screen appears, select the “Disclosing Agency” and the “Receiving Agency” from the drop down list
 - ✓ As a general guideline, the Disclosing Agency will be the Drug Court and the Receiving Agency will be the Client Service Provider.
4. Under “Determine if Consent should be Verified,” enter “Yes” to the question, “Always verify consent?”
5. In the Disclosure Domain Selection, select the Information that will be covered by the Consent, and the length of time the Consent will be valid.

6. Click the  to move the selected items to the Selected Options box.

7. Click on the  button to complete the Disclosure Relationship setup.


Section Three:

ATR Plan Management ✓ ATR Fund Management

The ATR funds allocated to each county ATR Management Agency are managed within the VMS through the ATR Plan Management section.

This will allow the ATR Management Agency to set a cap on the total amount of funds available for services. Once the cap is reached, an ATR Voucher cannot be created unless the cap is increased.

- ✓ The ATR Plan Management cap is based on the county-wide funding allocation, and is not specific to any contract or service.
- ✓ Fund management provides the means to help control the burn rate of the ATR fund by allowing administrators to gradually increase funding over the life of a grant.
- ✓ One can only access the ATR Fund Management screen can be accessed only by the fiscal coordinator at the ATR Management Agency.

To manage the funds allocated to ATR within VMS:

1. Click on Contract Management and then on ATR Plan Management in the Agency sub-menu on the Left-side Navigation bar
- ✓ This will bring up the Plan Management List, which displays the current amount allocated, the amount unallocated, the current vouched amount, and the amount available.
2. Click on the [Profile](#) link to open the page where the Allocated Amount can be modified.



Plan Name	Plan	Service Budget	Amount Allocated	Amount Unallocated	Vouched Amount	Available Amount	Actions
ATR (Yavapai County Drug Court)	ATR (Yavapai County Drug Court)	\$1,000,000.00	\$500,000.00	\$500,000.00	\$26,555.00	\$473,445.00	Profile

Total Service Budget: \$1,000,000.00
 Total Allocated Amount: \$500,000.00
 Total Unallocated Amount: \$500,000.00
 Total Vouched Amount: \$26,555.00
 Total Available Amount: \$473,445.00



Section Three:

ATR Plan Management

✓ ATR Fund Management

The information displayed on the “ATR Fund Management” screen includes:

- ✓ **The Fund Name:** the name of the fund
- ✓ **The Effective Date:** fund availability date
- ✓ **The Expiration Date:** last day of fund availability
- ✓ **Service Budget:** ATR Fund for service
- ✓ **Amount Allocated:** total amount currently allocated from the service budget
- ✓ **Amount Unallocated:** Service Budget- Amount Allocated

- ✓ **Vouched Amount:** Total Amount out in Vouchers
- ✓ **Available Amount:** Amount Allocated-Vouched Amount

Once the total amount vouched amount equals the Amount Allocated, no new vouchers can be created. If a case manager attempts to create a voucher after the Amount Allocated has been reached, the following error message will appear:

The cumulative amount of Authorization/vouchers cannot to exceed the ATR Fund Management Allocation, if this were to happen, error messages denying the ability to create vouchers would occur

Arizona Training

User: Candina, Kay
Loc: Yavapai County Drug Court, Yavapai County Drug Court
Client

ATR Plan Management Profile

Fund Name	ATR (Yavapai County Drug Court)	Plan	ATR (Yavapai County Drug Court)
Effective Date	2/09/2018	Service Budget	\$1,000,000.00
Expiration Date	8/30/2018	Amount Allocated	\$888,000.00
Created By	Administrator, WTS	Amount Unallocated	\$112,000.00
Created Date	5/4/2009 11:15 AM	Total Vouched Amount	\$28,888.00
Updated By	Schaas, Linda	Available Amount	\$475,112.00
Updated Date	5/4/2009 12:36 PM		

Buttons: Cancel, Save, Print

Fund Allocation Audit History (Expand)

Allocation #	Amount Allocated	System Date	Operator ID
1	\$888,000.00	5/4/2009 12:36 PM	Schaas, Linda



Section Three:

ATR Plan Management

✓ Client Cap

The County Fiscal Coordinator has the ability to set the Standard Client Cap to reflect the needs of the county's clients.

To set up the Client Lifetime Cap:

1. From the Left-side Navigation Bar, go to the Payor Plan List and click on the [profile](#) link.
2. The Payor Plan Profile screen will appear
3. The client plan-wide standard cap can be entered in the Standard Client Cap field.
4. Click on the **Save** or **Finish** button to complete the standard client cap setup.

✓ If this standard client cap needs to be overridden for an individual client, the State Fiscal Coordinator must be contacted for approval.

Arizona Training

User: Fiscal, Yavapai
Loc: Yavapai County Drug Court, Yavapai County Drug Court
Client:

Payor Plan Profile

2 Plan Type: Government Contract Contracting Agency: Yavapai County Drug Court

Plan Name: ATR (Yavapai County Drug Court) Funding Source: ATR

Billing Form: WITS Batch Standard Client Cap: 3 \$10,000.00

Company Name: Arizona ATR

Agency:

Clearing House Agency:

Claim Filing Type:

Client Confidential:

HIPAA EDI Information

Payor Name: Payor ID#:

Receiver Name: Receiver ETIN:

Application Receiver #: Interchange Receiver #:

HIPAA Processing Set:

Segment Delimiter: Element Delimiter: Composite Delimiter:

Administrative Actions

4 Cancel Save Finish Next



Section Four:

Provider Claims ✓ Final Adjudication

Once the case manager has accepted the pre-adjudication rules, the next step is for the county fiscal coordinator to adjudicate the contract.

This can be accomplished from the Profile of a claim submission with an Accepted status or from the Contract List Screen.

1. Click on the [Adjudicate Contract](#) link to be redirected to the Contract Adjudication screen.
2. Enter search criteria or leave all fields blank to display all of the records.
3. The “Accepted” claims are those ready for final review.
4. Click Adjudicate Contract

Note: All accepted batches will appear, however only the newly accepted Claim Batches need to be adjudicated. Previously adjudicated batches cannot be adjudicated again.

The screenshot displays two main sections of the VMS system interface. The top section, titled 'Provider Claims Adjudication search', includes search filters for Contract Name, Provider, Claim, Batch, Status, and Period. Below this is a table of 'Provider Claims Submission List' with columns for Claim Submission ID, Contract Name, Provider, Claim, Batch, Status, and Total Charge. A red circle with the number '1' highlights the 'Contract Name' field, and a red circle with the number '2' highlights the 'Status' column. A red circle with the number '3' highlights the 'Accepted' status in the table. The bottom section, titled 'Provider Claim Submission Profile', shows details for a specific claim submission, including Claim Status (Accepted), Submission ID (30), Type (RTS), Contract Name (TP11 Contract), Claim Count (2), Service Count (2), Total Charge (\$300.00), Received Date (7/28/2008), and Control # (30). A red circle with the number '4' highlights the 'Administrative Actions' section, which contains links for 'Adjudicate Contract' and 'Export Service List'. A yellow arrow points from the 'Accepted' status in the table to the 'Adjudicate Contract' link.



Section Four:

Provider Claims

✓ Final Adjudication

****Coming Soon****

The Provider Claim Submission List will soon have an additional column indicating which batches have already been adjudicated, which will eliminate the need to review each claim batch to determine its status.

HI-WITS QA

User: Denis, Ron
Loc: ATR Contractor, ATR Cont Fac 1
Client:

October 2008

Diagnosics Print View Logout

Home Page
Agency ▼
Agency List ►
GPRA Discharge Due
GPRA Followup Due
Facility List ►
Staff List ►
Tx Team Groups ►
Non-Staff Physicians ►
Staff Usage
Billing ►
Contract Management ►
Payor Adjudication ▼
Claim Submission
Adjudication Batch List
Payor Claim History
Group List ►
Client List ►
System Administration ►
My Settings ►
Reports

Provider Claim Submission Search

Contract: [Dropdown]
Provider Agency: [Dropdown]
Processing Status: [Dropdown]
Received Date: [Text Box]
Pending Count: [Text Box]
Clear Go

Provider Claim Submission List

Claim Submission Id	Contract Name	Provider	Charge	Rec'd Date	Status	Fully Adjudicated	Pend Cnt	Actions
80	ATR - Case Mgmt(1 ATR-Case Mgmt)	ATR Case Management Agency	\$2,010.00	10/21/2008	Accepted	No	0	Profile
79	ATR - Case Mgmt(1 ATR-Case Mgmt)	ATR Case Management Agency	\$8,001.00	10/20/2008	Accepted	Yes	0	Profile
78	ATR - Case Mgmt(1 ATR-Case Mgmt)	ATR Case Management Agency	\$80,010.00	10/20/2008	Accepted	Yes	0	Profile
77	ATR Provider(ATR Provider)	ATR Provider	\$50.00	10/14/2008	Accepted	No	2	Profile
76	ATR Provider(ATR Provider)	ATR Provider	\$55.00	6/19/2008	Accepted	Yes	0	Profile
75	ATR Provider(ATR Provider)	ATR Provider	\$10.00	6/19/2008	Accepted	No	1	Profile
74	ATR Provider(ATR Provider)	ATR Provider	-\$30.00	6/19/2008	Accepted	No	2	Profile
73	ATR Provider(ATR Provider)	ATR Provider	\$20.00	6/19/2008	Accepted	No	2	Profile
72	ATR Provider(ATR Provider)	ATR Provider	\$10.00	6/19/2008	Accepted	No	1	Profile
71	ATR Provider(ATR Provider)	ATR Provider	-\$130.00	6/19/2008	Accepted	No	1	Profile
70	ATR Provider(ATR Provider)	ATR Provider	\$100.00	6/19/2008	Accepted	No	1	Profile
69	ATR - Case Mgmt(1 ATR-Case Mgmt)	ATR Case Management Agency	\$6,750,000,000.00	6/2/2008	Accepted	Yes	0	Profile
68	ATR - Case Mgmt(1 ATR-Case Mgmt)	ATR Case Management Agency	-\$2,500.00	5/30/2008	Accepted	Yes	0	Profile

Internet | Protected Mode: Off 100%



Section Four:

Provider Claims ✓ Adjudicating Claim Batches

Before finalizing the adjudication you can reviewing each claim line item within a batch

1. Click on the [Adjudicate Contract](#) link in the Administrative Actions box in the lower left corner of the Provider Claim Submission Profile.
2. Click on [Profile](#) in the Actions column to:
 - ✓ Review the claim
 - ✓ Add a note to the individual claim
 - ✓ Change the Adjudication action (from pay/deny, or pend/pending to something else)
3. Click on [Finish](#) when you are done making any changes.

The screenshots illustrate the steps for adjudicating claim batches in the Arizona Training VMS system. The first screenshot shows the 'Provider Claim Submission Profile' page, where the 'Adjudicate Contract' link is highlighted in the Administrative Actions box. The second screenshot shows the 'Claim Line Adjudication for TP5-10' table, where the 'Profile' link in the 'Actions' column is highlighted. The third screenshot shows the 'Adjudication for TP5 Contract- AOC' form, where the 'Deny' dropdown, the 'Audit Flag' dropdown, the 'Reviewed Indicator' dropdown, and the 'Comments' text area are highlighted.



Section Four:

Provider Claims ✓ Adjudicating Claim Batches

1. Once all of the Claims in the Claim Batch have been reviewed, click on [Finalize Adjudication](#) to execute the adjudication actions.
 2. A prompt will appear to confirm that Final Adjudication should be executed. Click yes to confirm, or no to abort it.
- ✓ Finalized claims can be reviewed by clicking on the [Payor Claim History](#) link in the left-hand Navigation Menu.
 - ✓ The claims that show are coded Paid in the claim history will be visible to the Provider as a Payment in the Provider's Agency Billing Payment List screen.



Section Five:

Accounts Payable

✓ Accounts Payable Reports

This section is currently under construction pending finalized instructions from the GOCYF



Section Six:

Reports ✓ Overview

The VMS offers several report templates that can either be viewed on screen or exported into an Excel file.

The Excel file generally contains more data information than is shown in the on screen report, and these data can be manipulated.

The on-screen reports are useful for a quick review of the information.

Remember: To export the information to an Excel file, you must hold down the **CTRL** key until you are prompted to either save or open the file

To view the reports:

1. From the Home Page screen, click on the [Reports](#) link in the left navigation menu. This will bring up a list of available reports.
2. Click on the appropriate report name.
3. Choose the report parameters.
4. Three buttons provide action choices.
 - On Screen displays the results in the current window.
 - Export creates an Excel spreadsheet containing



Section Six:

Reports

✓ Report Descriptions

Category	Report Name	Report Description
Access	Referrals in by Agency	This report lists counts and percentages for referral status for all clients who have been referred in by outside agencies. Percent referred in by this agency and percent referred in from all agencies out of total clients is also given.
	Referrals out by Agency	Provides counts and percentage of clients referred out by agencies prior, during, and after treatment.
QA/QC	Program Enrollment Counts	This report displays the number of clients that were enrolled and dis-enrolled to/from all programs within an agency within a specific date range.
	Client List by Program	Report lists all clients by program and whether they are currently enrolled. If the client is not currently enrolled, reason for termination is given
Security	Staff Permissions Summary	Report lists staff access roles, title, manager, facility, start and end date, and whether the staff is authorized to access the system
Miscellaneous	ATR Interview Data	Reports raw ATR interview data. Note: many fields are NOT shown on this screen to improve the performance of this report. Please click 'Export' button and then 'open' or 'save' to show all data fields.
	ATR Voucher Transaction Data	Reports raw ATR voucher data. Note: many fields are NOT shown on this screen to improve the performance of this report. Please click 'Export' button and then 'open' or 'save' to show all data fields.
	Client Profile Data	Reports raw ATR client profile data. Note: many fields are NOT shown on this screen to improve the performance of this report. Please click 'Export' button and then 'open' or 'save' to show all data fields.
	Combined Note Data	Reports raw ATR Encounter note and Miscellaneous note data. Note: many fields are NOT shown on this screen to improve the performance of this report. Please click 'Export' button and then 'open' or 'save' to show all data fields.
	Encounter Data	Reports raw ATR encounter data. Note: many fields are NOT shown on this screen to improve the performance of this report. Please click 'Export' button and then 'open' or 'save' to show all data fields.



Section Six:

Reports

✓ Report Descriptions

Category	Report Name	Report Description
Billing	Aging and Trial Balance	Serves as both an aging and trial balance report. The aging portion quickly identifies the most delinquent invoices. The trial balance portion provides situational detail to support the aging portion.
	Authorized Services	Details the authorized services for each plan. Some fields are only shown once.
	Claims Reconciliation	Report enables providers to reconcile claims with paid invoices. Allows providers to determine whether an invoice has been paid and find which claims have been paid on each invoice.
	Contract Summary	Shows transaction history, including date, type, ID, authorized amount, and expended amount for a given contract in a given fiscal year.
ATR	A1-Access to Recovery Providers	Gives the number of providers separated by treatment vs. recovery and faith-based vs. secular.
	ATR Clients Interviewed by Week	Shows the number of clients with at least one interview/assessment over historical weekly periods based on the date of the interview. Also shows separate counts and running total of the clients interviewed at FBOs and at non-FBOs.
	ATR Interview Compliance Report	Shows the percentage of the compliance of the ATR interviews in a given time range.
	ATR Vouchers Issued by Week	Shows the number of vouchers issued over historical weekly periods based on the date the voucher was created.
	Monthly Client/Voucher Summary	Opens Excel spreadsheet containing client voucher summaries.
	Vouched Services by Agency	Shows vouched services by agency.
	Voucher Service Life and Cap	Displays the number of vouched units, vouched minimum and maximum amounts, and average length of voucher life.
	Voucher Status Dashboard	Shows status of vouchers for a given agency.

